Buyer Channel Map — Italy

Who actually buys food in Italy, channel by channel — and what each buyer type wants before a first meeting. A structural map for Central-European food producers, not a contact list.

The 60-second read

No single chain opens the country. Italy is large but unusually fragmented: Conad and Coop Italia dominate — both built as associations of members rather than centralised companies — while Esselunga is a high-performing regional force in the north. Much of the real purchasing power sits with buying groups (centrali d'acquisto) that aggregate demand across banners.

Foodservice is a channel in its own right. Italy has one of Europe's largest HoReCa sectors — around 220,000 restaurants and food-service establishments, second only to France in the EU by number of outlets. A great deal of volume moves through cash-and-carry and specialist distributors, not the retail aisle.

Buyers negotiate hard on both price and quality. Regional distributors carry genuine weight, and discount (Eurospin, Lidl, MD) is taking share fast.

The channel map

Buyer type	Who they are	What they want first	Realistic role for a CE producer
Retail category desks	Buyers behind Conad, Coop Italia, Esselunga	IFS/BRCGS, Italian labelling, price *and* quality defended together	Brand listing or own-brand supply
Buying groups	Selex, VéGé, Agorà, C3 — aggregating purchasing across independent banners	Certification, national capacity, competitive terms across banners	Brand / own-brand supply at scale
Regional distributors	Cold-chain and ambient distributors with strong regional reach	Category fit, reliable delivery windows, certification	Brand placement into retail + foodservice
HoReCa & foodservice	Cash-and-carry and specialty distributors supplying bars, restaurants, hotels, canteens	Bulk catering formats, consistent supply	Foodservice supply (often the most productive first meeting)
Discount	Eurospin, Lidl, MD	Sharp price, dependable volume, private-label capability	Private-label supply
Industrial / ingredient buyers	Ready-meal and convenience producers buying inputs	Spec sheets, food-safety docs, bulk formats	Ingredient / semi-finished supply

Named retail groups (public knowledge)

Conad — biggest grocery group; an association of independent member retailers.

Coop Italia — consumer-cooperative system; a top-two force with strong own-brand.

Esselunga — high-performing regional chain, strongest in the north; private-label front-runner.

Selex & buying groups — major buying group (with VéGé, Agorà, C3); aggregates purchasing across independent banners.

Eurospin / Lidl — fast-growing discount; Eurospin dominates Italian discount alongside Lidl and MD.

Trade calendar hooks

Italy's own shows (**CIBUS**, Parma; **Marca**, Bologna for private label; **Tuttofood**, Milan) matter here more than in most markets, and **Anuga** (Cologne) draws Italian buyers too. Honest line: fairs help in a fragmented market where there's no single desk to reach — but the buying groups, regional distributors and foodservice channels can be opened directly, year-round, once you know which one fits your range.

Three mistakes CE producers make in Italy

Looking for one national buyer. There isn't one. Conad and Coop work through members, buying groups aggregate the rest, and regions differ — you reach the right buyer in *each* channel, not a single desk that unlocks the country.

Overlooking foodservice. Much of the real volume moves through HoReCa and cash-and-carry, not the retail aisle — for many ranges the foodservice distributor is the most productive first meeting.

Defending price *or* quality, not both. Italian buyers negotiate hard on the pair. Arrive with only a sharp price or only a quality story and you've answered half the question.

This map shows *where* the buyers sit. ProspectX gets you in front of the named ones — matched to the right channel in a fragmented market. → Book a Discovery Call.

Sources

(Only facts not already published on getprospectx.com/export are sourced here.)

Italy ~220,000 restaurants and food-service establishments; second in the EU by number of food-service enterprises (~155,560) after France: Statista, "Restaurants and mobile food service enterprises in the EU 2023" — https://www.statista.com/statistics/684211/number-of-enterprises-in-the-food-and-beverage-service-industry-in-the-eu-by-country/ ; Statista, "Restaurants and food services in Europe — statistics & facts" — https://www.statista.com/topics/3966/restaurants-and-food-services-in-europe/